Creating Ad Hoc Reports

ACE Reports Videos

September 2020

U.S. Customs and
Border Protection

INTRODUCTION

Ad hoc reports are custom reports created from a blank form. You must set up the query filter to return data, add result objects to display, and set up the **Report View** to display the data.
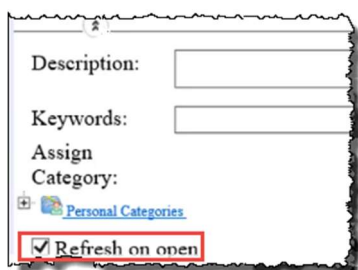
The first step to create an ad hoc report is to choose a universe to retrieve data objects. The universe selected will determine what data objects are available for the report. Use the **ACE Reports Data Dictionary** found in the **ACE Reports – Training Resources** page to determine what universe contains the required data objects.

CREATE AN AD HOC REPORT

1. In the **ACE Reports Home** tab, select the **Create Ad Hoc Report** button.

2. In the **Universe**: drop-down menu, select a universe.

3. In the **Report Name**: field, type a report name.

4. If necessary, in the **Report Description** field, type a description of the report.

5. Select the **Create Adhoc** button.

   The Adhoc report displays, and saves automatically in the AdhocTemp folder.

6. In the **Reading mode** toolbar, in the **Save** 💾 drop-down menu, select **Save As**.

7. In the **Save As** dialog box:

   a. Save the report to the desired location.

   b. In the **File Name:** field, type the *name of the report*.

   c. Select the double right arrow ⏩ to expand the dialog box.

   d. Uncheck the **Refresh on open** option if you do not want the report to refresh every time it opens.

8. Select the **Save** button.

TIP: For information on accessing the query panel, setting query filters, and setting filter prompts, see the Modifying Query Filters video and Quick Reference Card (QRC).